

# Heritage Retrofit

## Document B - Invitation to Tender

The invitation to tender should be read in conjunction with the guidance notes for applicants, frequently asked questions and the competition briefing event. Applicants will also have the opportunity to ask questions via email during the application process. Responses to questions will be provided to all applicants for transparency.

### Summary

Cardiff Council, with support from Welsh Government, Technology Strategy Board, Cadw and Low Carbon Research Institute, is offering funding of up to £450,000 to develop innovative measures that will improve the energy performance of traditional & historic buildings.

The Small Business Research Initiative (SBRI) process is being used to develop feasibility studies for affordable retrofit products and services which reduce energy consumption or generate energy whilst being fully compatible and appropriate to the particular characteristics of historic and/or traditional buildings. A later phase of the project will offer historic property from Cardiff Council's estate in which to further develop and demonstrate the most promising feasibility projects.

Accordingly, solution providers are encouraged to submit proposals for innovations that could bring a new concept, approach, methodology, tool or technology to the retrofit market. Proposals must address the following key challenges:

- be fit for purpose and compatible with the fabric of traditionally constructed (generally pre-1919) buildings;
- be visually sympathetic to the historic character of buildings designated for their special architectural or historic interest;
- increase the energy performance of the building;
- be affordable, easy to apply and with demonstrable additionality and scalability within the wider retrofit sector.

Cardiff Council are seeking innovative ideas that can be tested through feasibility studies. Those organisations successful at feasibility study stage will have the opportunity to bid for further funds for demonstrator stage to provide a proof of concept for the market place.

## Application Process

Welsh SBRI competitions are open to all organisations that can demonstrate a route to market for their solution. The SBRI scheme is particularly suited to small and medium-sized business, as the contracts are of relatively small value and operate on short timescales. Developments are 100% funded and focused on specific identified needs, increasing the chance of exploitation. Suppliers for each project will be selected by an open competition process and retain the intellectual property generated from the project, with certain rights of use retained by the contracting Authority. This is an excellent opportunity to establish an early customer for a new technology and to fund its development.

Details of the challenge are contained in the summary above and also in the competition brief. You are strongly advised to read the guidance notes before completing the application form.

The competition will have two phases:

**Phase 1** is intended to show the technical feasibility of the proposed innovations. The development contracts placed will be for a maximum of four months (April – July 2014) and have a maximum value of £30,000 per project.

**Phase 2** contracts are intended to develop and evaluate prototypes or demonstrators from the more promising innovative solutions from Phase 1. Funding for this phase is not expected to exceed £150,000 per demonstrator project with an end date of March 2015.

At this stage contracts will only be let for Phase 1 with a further bidding/evaluation process set for Phase 2. A limited number of places are available for Phase 2, with only the best projects going forward.

Applicants should state their goals and present an outline plan for Phase 2, as an explicit part of the path to full commercial implementation, in their Phase 1 proposal.

All bids must be submitted using the application form provided and submitted using the email address provided. Your application should be submitted by the deadline indicated on the application form as late applications will not be accepted. All sections are mandatory for completion and the form must be signed as stated. An unsigned form constitutes a non bid and will not be accepted.

If you wish to provide supporting information you may do this using accompanying papers or documents, but these should be referenced appropriately in your application form.

## Assessment

Applications will be reviewed by a selected expert assessment panel. It may be that a number of finalists will be requested to attend an interview or provide a demonstration for the panel. Contracts will be awarded shortly thereafter. Feedback to applicants will be given once the assessment process has been completed. Your application will be assessed against the following criteria:

- Is the proposal within scope for this competition?
- How well does the proposal address the key challenges?
- To what extent does the proposed project have commercial potential to lead to a marketable product, process or service?
- How significant is the competitive advantage which this technology affords over existing/alternate technologies that can meet the market needs?
- How appropriate is the technical approach that will be adopted?
- How sound is the approach of the proposed plan for establishing technical and commercial feasibility?
- What is innovative about this project? To what extent does the project develop or employ novel concepts, approaches, methodologies, tools, or technologies for this area?
- To what extent does the organisation appear to have the right skills and experience to deliver the intended benefits?
- How effectively will the project be managed? The proposal should demonstrate that there is a clear management plan which will enable the resources, including manpower to be used to maximise high quality research outputs.
- What are the risks (technical, commercial and environmental) to project success? How effectively will these be managed?
- How appropriate is the proposal financially? Is the overall budget realistic and justified in terms of the aims and methods proposed? Does the proposal represent fair market value?
- How appropriate are the milestones and evaluation procedures appropriate?
- What community benefits can this project offer?

Successful applicants will be advised according to the published key dates and organisations will be expected to mobilise rapidly to start the project. It is important that Projects start soon after the contract has been issued so that all projects can be assessed fairly.

## Conditions

Before applying, companies should be in agreement with the terms and conditions contained in Document G - Example SBRI Contract.

### Documents associated with this competition

- A - Competition Brief
- B - Invitation to Tender (this document)
- C - Guidance for Applicants
- D - Application Form
- E - FAQs
- F - Notable Dates for Bidders
- G - Example SBRI Contract

## Contact Points

**Any queries in relation to this competition should be directed to:**

Ross Cannon  
Conservation Policy & Projects, Cardiff Council  
Email: [heritagesbri@cardiff.gov.uk](mailto:heritagesbri@cardiff.gov.uk)  
Tel: 02920 873222

Once the competition has closed no further dialogue will be entered into. Feedback will be available for unsuccessful and successful applicants.

Questions on SBRI and the Welsh SBRI programme should be addressed to [innovation@wales.gsi.gov.uk](mailto:innovation@wales.gsi.gov.uk)

In order to streamline the process for this competition, feedback to applicants may not be available until after the contracts have been let.

## More information

More information about this and other pre-commercial procurements undertaken across the UK can be found on the Technology Strategy Board (TSB) competitions portal via the following link:

[www.innovateuk.org/funding-competitions](http://www.innovateuk.org/funding-competitions)